



Payment Solutions for Service Providers
User Manual Addendum for MedEdi Users

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Post Nexion Installation

Please contact the MedEDI support helpdesk and have them load the necessary files for integration. This process needs to happen before the Nexion Installation takes place.

Contact Number: 0861 633 334

Transacting with Nexion

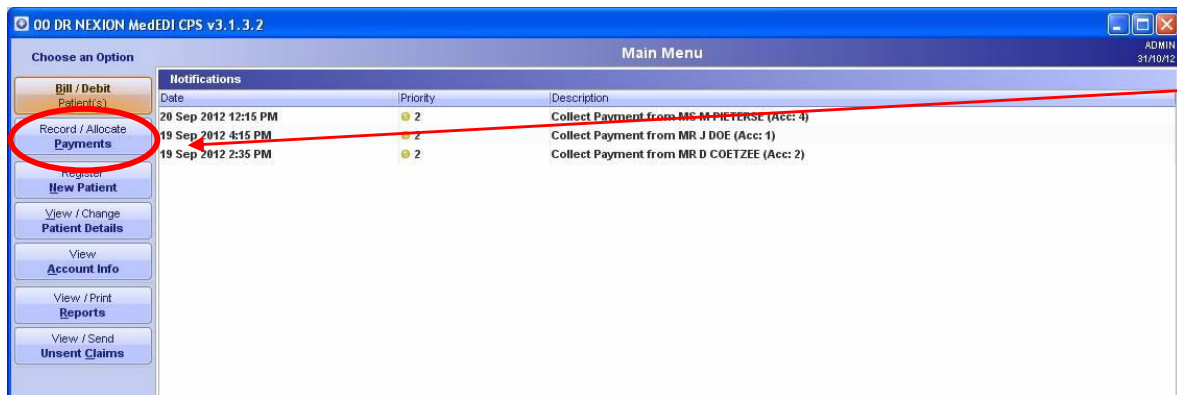
There are 2 methods of processing Payments through Nexion.

A. Payments originating from MedEDI

B. Payments originating from Nexion Standalone and Allocation of Standalone Payments

A. Payments originating from MedEDI.

- 1.1) Select the “Record / Allocate Payments” tab (A).



- 1.2) From the “Record / Allocate Payments” sub window select Record Patients Payment (B)



Enter the Account Number and hit Enter

- 1.3) On the **Record Patient Payment** Screen,
Select your payment type **(D)** and enter your amount **(E)** Once complete , click Accept Changes **(F)**

- 1.4) The Payment Receipt screen is now displayed:

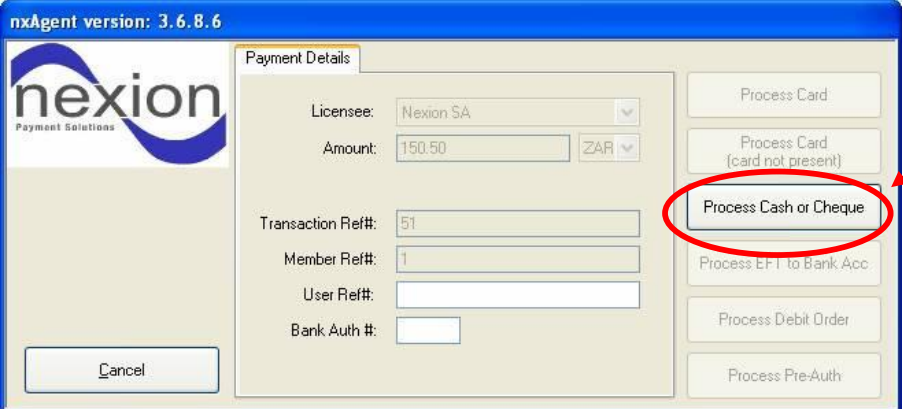
- 1.5) Click the “OK” button (G) to display the Nexion Payments screen.
Click the “Process ...” button eg: (H) – This would be dependent on which TRXN type was selected in (D) above



The "Payment Receipt" dialog box contains the following fields and controls:

- Receipt** section:
 - Receipt Number: 51
 - Date: 31/10/2012
- Nexion** section:
 - Nexion Transaction Ref: [empty field]
 - Text: "This field should **only** be used where a transaction already exists in Nexion"
- Buttons: "Ok" and "Cancel". The "Ok" button is circled in red.

A red arrow points from a box labeled "G" to the "Ok" button.



The "Nexion Payment Solutions nxAgent version: 3.6.8.6" window displays the following information:

- Payment Details** section:
 - Licensee: Nexion SA
 - Amount: 150.50 ZAR
 - Transaction Ref#: 51
 - Member Ref#: 1
 - User Ref#: [empty field]
 - Bank Auth #: [empty field]
- Buttons on the right:
 - Process Card
 - Process Card (card not present)
 - Process Cash or Cheque (circled in red)
 - Process EFT to Bank Acc
 - Process Debit Order
 - Process Pre-Auth
- Buttons on the left:
 - Cancel

A red arrow points from a box labeled "H" to the "Process Cash or Cheque" button.

- 1.6) Click on Complete (I) To bring up the Allocate Credit screen



nxAgent version: 3.6.8.6

Copy Reprint **Complete**

Successful Cash Transaction

Merchant : Nexion SA
6 Gold Street, Northgate Business Park
Cape Town

License : NEX7700N00010002
Date : 2012/10/31 16:00:30
Username : Derick

Cash Receipt

Trxn Ref : 51
Mem Ref : 1
Nexion Ref : 644874

AuthId : 644874
Merchant ID : 000002191901185
Terminal ID : 00001292

Amount : R 150.50

Powered by Nexion

- 1.7) Type in the amount to be allocated (J) and then click “Accept Changes” (K).

00 DR NEXION MedEDI CPS v3.1.3.2

ADMIN 31/10/12

Choose an Option

Accept Changes Discard Changes

Allocate Credit

Allocation Details

Account	1	DOE, J MR	Ref	Cell
Churn Amount	-150.50	Unallocated	150.50	Total Unalloc
				280.85
				Available Funds
				280.85

Outstanding Bills

Date	Inv No	Code	Description	Patient	Chg	Outst	Alloc	Med Aid	Pat Due	Bal
19/09/12	5	0190	NEW AND ESTABLISHED P...	MR J DOE	253.34	237.72	150	0.00	237.72	237.72



B. Payments originating from Nexion Standalone

nxAgent version: 3.8.9.29

Payment Details

Licensee: Nexion SA

Amount: [] ZAR

Transaction Ref#: []

Member Ref#: []

User Ref#: []

Bank Auth #: []

Process Card

Process Card (card not present)

Process Cash or Cheque

Process EFT to Bank Acc

Process Debit Order

Process Pre-Auth

Cancel

Nexion fully functional

A

B

C

D

E

F

G

Please Note:

These details will appear on the Patients Account.

- (A) Merchant:** The Doctor who will be credited with the transaction amount.
- (B) Amount:** The total amount to be collected from the cardholder
- (C) Currency:** The Currency is defaulted to ZAR and cannot be changed.
- (D) Transaction Ref#:** This is a sequential transaction number generated by MedEDI for that specific patient and will be displayed on the Nexion Report under Transaction Ref#.
- (E) Member Ref#:** This Account Number for that specific patient and will be displayed on the Nexion Report under Member Ref#.
- (F) User Ref#:** This field only needs to be completed if additional information needs to be added in.
- (G) Bank Auth#:** This field only needs to be completed upon request from the bank. A Specific Declined reason will determine this.

2. Cash Transactions

- 2.1) Click the **“Process Cash or Cheque”** button. At this point you will be prompted to select the cash payment type: Cash or Cheque

Select Cash tender Type

- 2.2) At this point a Cash receipt will be displayed. The preset number of cash receipts will also automatically be printed to your default printer

The Nexion Receipt

nxAgent version: 3.7.10.28

Email Reprint Complete

Successful Credit Card Transaction

Merchant : Nexion SA
Unit 16, Block 1, Northgate Island,
ysterplaat
Cape Town

License : NEX7700N00010002
Date : 2013/10/30 13:42:53
Username :

Card Payment Receipt

Trxn Ref : DEB 01820
Mem Ref : J Smith
Nexion Ref : 826497

AuthId : 348451
Merchant ID : 000002191901185
Terminal ID : 00001292

Card Type : Credit
Card # : 5221*****1234

Amount : R 430.00

I agree to pay this amount as per my
cardholder agreement

Cardholder
Signature.....

Powered by Nexion

- 2.3) The receipt will print automatically to the default printer, click on “**Complete**”. If the receipts did not print for any reason, click the “**Reprint**” button and a single receipt will be re-printed.

nxAgent version: 3.7.10.28

Email Reprint Complete

The “Email” button allows the users to send the receipt via email to a specific email address .

Email To

Email Address

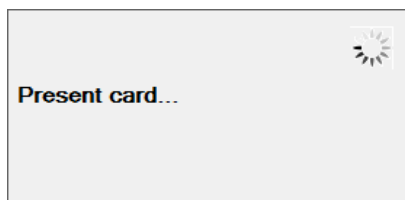
Cancel Continue

3. Credit & Debit Card Transactions

- 3.1) Click the “**Process Card**” button.



- 3.2) A screen will be displayed, prompting the user to swipe the card.



- 3.3) You will be prompted on the terminal to select an account type:

If the card is a **Debit Card***

Confirm with Cardholder if the debit card is linked to a **Cheque** or **Savings** account.

Choose option **#1 for Cheque** or **#2 for Savings**

Refer to the LOGO on the card; Logo's with Visa Electron or Maestro are debit cards.

**In the case of a debit card your client will be prompted to enter their PIN on the terminal and to press Enter to confirm.*

- 3.4) The terminal will now prompt you to re-confirm the transaction amount by pressing the green “**Green**” key on the paypoint terminal.

The Nexion Receipt

nxAgent version: 3.7.10.28

Email Reprint Complete

Successful Credit Card Transaction

Merchant : Nexion SA
Unit 16, Block 1, Northgate Island,
ysterplaat
Cape Town

License : NEX7700N00010002
Date : 2013/10/30 13:42:53
Username :

Card Payment Receipt

Trxn Ref : DEB 01820
Mem Ref : J Smith
Nexion Ref : 826497

AuthId : 348451
Merchant ID : 000002191901185
Terminal ID : 00001292

Card Type : Credit
Card # : 5221*****1234

Amount : R 430.00

I agree to pay this amount as per my
cardholder agreement

Cardholder
Signature.....

Powered by Nexion

- 3.4)1. The receipt will print automatically to the default printer, click on “**Complete**”. If the receipts did not print for any reason, click the “**Reprint**” button and a single receipt will be re-printed.

nxAgent version: 3.7.10.28

Email Reprint Complete

Allocating of Standalone Payments

Payments can be processed on Nexion only but needs to be allocated to the patient account at sometime. Please follow this procedure

- 1.1) Select the “Record / Allocate Payments” tab (A).

The screenshot shows the 'Main Menu' of the Nexion MedEDI CPS v3.1.3.2 application. On the left, under 'Choose an Option', the 'Record / Allocate Payments' button is circled in red. A red line points from this button to a label 'A' in a grey box. The main area displays a 'Notifications' table with columns: Date, Priority, and Description. The table contains three rows of notifications related to payment collection from various patients.

Date	Priority	Description
20 Sep 2012 12:15 PM	2	Collect Payment from MS M PIETERSE (Acc: 4)
19 Sep 2012 4:15 PM	2	Collect Payment from MR J DOE (Acc: 1)
19 Sep 2012 2:35 PM	2	Collect Payment from MR D COETZEE (Acc: 2)

- 1.2) From the “Record / Allocate Payments” sub window select Record Patients Payment (B)

The screenshot shows the 'Record / Allocate Payments' sub window. On the left, under 'Choose an Option', the 'Record Patient Payment' button is circled in red. A red line points from this button to a label 'B' in a grey box. The main area displays a table titled 'Open Remittances' with columns: Ref. No., Created, Batch Date, Source / Description, Check Total, and Batch Total. The table contains one row of data.

Ref. No.	Created	Batch Date	Source / Description	Check Total	Batch Total
456	20 Sep 2012	17 Sep 2012	PROSANO	10.00	0.00

Enter the Account Number and hit Enter

The screenshot shows the 'Record Patient Payment' sub window. On the left, under 'Choose an Option', the 'Accept Changes' button is checked. The main area displays a form titled 'Account Details' with fields for Account No., Name, Address, Type, Contact Details (email, Tel, Cell, Fax), Last Pat. Pmt., Last Remit., Last Stmt., and Final Notice. The 'Account No.' field is circled in red. Below the form, there are tabs for 'Payment Details' and 'Payment Summary'.

- 1.3) On the **Record Patient Payment** Screen,
Select your payment type **(D)** and enter your amount **(E)** Once complete , click Accept Changes **(F)**

Record Patient Payment

Choose an Option: ☒ Accept Changes, ☐ Discard Changes

Account Details

Account No: 1, Name: DOE, J MR, Filing Ref: [blank]
 Status: NORMAL, Address: NEXION, Contact Details: email: nexion@nexion.co.za
 Type: NORTHGATE BUSINESS PARK, Tel: [blank], Cell: [blank], Fax: [blank]
 7435, MILNERTON

Last Pat. Pmt: 10 Oct 12 (R 251.00), Last Remit: None, Last Stmt: None, Final Notice: None

Out: 107.37, 30, 237.72, 60, 00, Unpa: -130.35, Claim: 0.00, Liab: 107.37

Payment Details

Receipt No.: [blank], Receipt Date: 31/10/2012, Payment Type: Cash, Amount: 150.50, Discount Fixed: [blank], Total: 150.50, Patient Liab: -43.13

Callout boxes: **D** (Payment Type), **E** (Amount), **F** (Accept Changes)

- 1.4) The Payment Receipt screen is now displayed:
- Select the **Date** processed on Nexion Standalone **(A)**
- Type in the **Nexion Reference (B)** into the Nexion Transaction Ref Field.
The Nexion Reference can be located on the Nexion Report or the Nexion Receipt.
- Click **OK** to continue **(C)**

```
Trxn Ref   : Acc No 1234
Mem Ref    : Mr J Smith
Nexion Ref  : 650409
```

Payment Receipt

Receipt

Receipt Number: 53, Date: 09/11/2012

Nexion

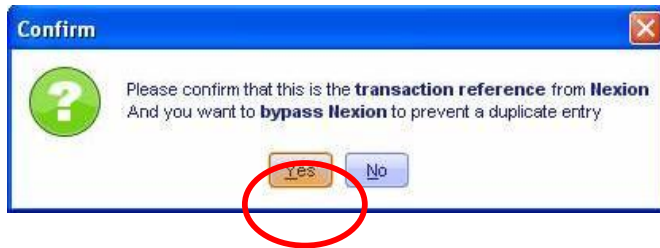
Nexion Transaction Ref: 650409
 This field should **only** be used where a transaction already exists in Nexion

Buttons: Ok, Cancel

Callout boxes: **A** (Date), **B** (Nexion Transaction Ref), **C** (Ok)

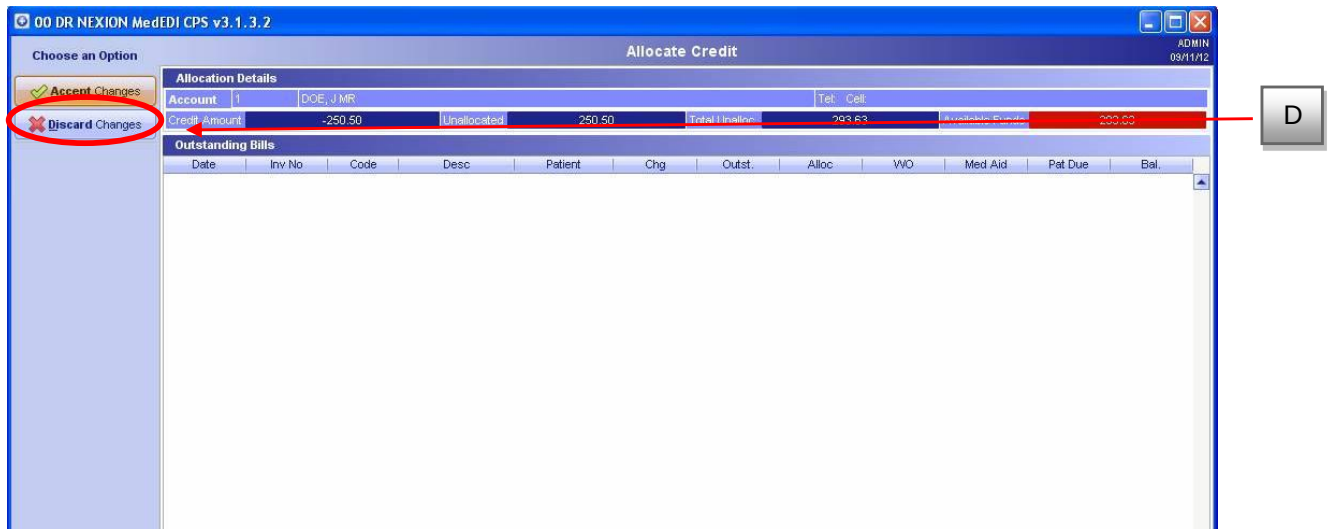
Click YES to continue.

1.5)



Confirm that the amount listed is correct and Click Accept Changes (D)

1.6)



For any queries regarding Nexion please call our Call Centre on

0861 639 466